

Agency Management Institute

# Breaking the Bottleneck Toolkit

Five tools to get decisions off your desk without the work falling apart

*Companion to the Build A Better Agency solocast "You're the Bottleneck. Now What?"*



If you’re busy doing someone else’s job, then no one is doing your job.

You’re the only one who can do the owner’s job.

These tools help you find where work is waiting on you, figure out who could take it, and hand it off on purpose.

## How to use the tools

| Tool | What it does | When | Time |
|---|---|---|---|
| **1. Bottleneck Self-Assessment** | Shows where you're the bottleneck and what staying in the middle pays you | Day one | 10 minutes |
| **2. Waiting-On-Me Log** | Turns gut feel into a real list of what waits on you | Two weeks, starting today | A minute or two a day |
| **3. Who Could Take This?** | Tests the "I don't have anyone" story and picks a path | End of week two | 20 minutes |
| **4. Decision-Rights Map** | Sets the authority step you're handing over | Before the handoff | 30 minutes |
| **5. Keys Conversation Guide** | Prepares the handoff conversation and your first 90 days | Within a week of choosing | 20 minutes to prep |

## The four steps behind the tools

| Step | What it means | Tool |
|---|---|---|
| **Spot it** | Find where work piles up waiting on you. | 1 and 2 |
| **Size it** | Decide how much authority to hand over. It doesn't have to be all or nothing. | 3 and 4 |
| **Say it** | Have the Keys Conversation: the decision, why them, the authority step, the guardrails, what good looks like and when you'll check in. | 5 |
| **Stay out of it** | Keep your check-ins, keep your hands off the work in between, and don't grab the keys back after the first miss. | 5 |

## The four authority steps

Tools 3, 4 and 5 use these steps. They're AMI's Leadership Responsibility Progression, the same four steps in the Leadership Capacity Planner. Someone who isn't ready for Step 4 may be completely ready for Step 1. Start where they are and move them up as they earn it. Decisions that should stay with you aren't on the ladder. Mark them "Keep."

| Authority step | Who decides | What it sounds like |
|---|---|---|
| **Step 1: Watch and recommend** | You, after hearing their recommendation | "Sit in on this one. Tell me what you'd do and why before I decide." |
| **Step 2: Decide together** | You decide together, and they do the talking | "Let's make this call together. You lead the conversation." |
| **Step 3: They decide, you review** | They decide, and you review before it goes out | "You make the call. Let me take a quick look before it goes out." |
| **Step 4: They decide within guardrails** | They decide within the guardrails, and you hear about it after | "It's yours within these guardrails. Fill me in at our one-on-one." |

# Tool 1: Bottleneck Self-Assessment

Spot it | 10 minutes | Be honest. Nobody sees this but you.

## Part A: Where are you the bottleneck?

Score each statement from 1 to 5. 1 = never true, 3 = sometimes true, 5 = almost always true. Add up each area.

### Approvals and decisions

| # | Statement | Score (1–5) |
|---|---|---|
| 1 | Work regularly sits waiting for my sign-off before it can move. | |
| 2 | My team asks me questions they could answer themselves. | |
| 3 | When I'm out for a few days, decisions pile up until I'm back. | |
| 4 | Pricing, discounts and scope changes all need my OK. | |
| | **Approvals and decisions total (4–20)** | |

### Client relationships

| # | Statement | Score (1–5) |
|---|---|---|
| 5 | Clients call or email me directly instead of their account lead. | |
| 6 | I'm on calls for our biggest clients "just in case." | |
| 7 | If I stepped away from our largest client, I worry we'd lose them. | |
| 8 | My account team doesn't have the authority to say no to a client. | |
| | **Client relationships total (4–20)** | |

### New business

| # | Statement | Score (1–5) |
|---|---|---|
| 9 | New business only happens when I personally make time for it. | |
| 10 | Our pipeline goes quiet when client work gets busy. | |
| 11 | No one else on the team can run a new business meeting without me. | |
| 12 | Proposals and pricing for prospects all come from me. | |
| | **New business total (4–20)** | |

## Creative and quality control

| # | Statement | Score (1–5) |
|---|---|---|
| **13** | I review most work before it goes to a client. | |
| **14** | I rewrite or redo work instead of giving feedback. | |
| **15** | Good ideas from the team get changed to match how I'd do it. | |
| **16** | Strong people have left, or I worry they might, because they don't get to own the work. | |
| | **Creative and quality control total (4–20)** | |

## Part B: Read your scores

| Area total | What it means |
|---|---|
| 4–8 | You're mostly out of the way here. Protect it. |
| 9–14 | Watch this area. Some things are starting to route through you. |
| 15–20 | You're the bottleneck here. Start your Waiting-On-Me Log with this area in mind. |

| | |
|---|---|
| My highest-scoring area: | |
| My second-highest area: | |

## Part C: What does staying in the middle pay you?

Being the bottleneck pays you something. Until you're honest about what, you'll keep paying for it. Check every statement that sounds like you.

| Payoff | Sounds like me | |
|---|---|---|
| **Being needed** | I like it when people need me. It's proof that I matter. | |
| | I'm not sure what my role would be if the team didn't need me for this. | |
| **Control** | If it goes through me, nothing surprises me. | |
| | If it isn't done my way, it doesn't feel right. | |
| **Being the hero** | I'm the one the client calls when it matters. | |
| | I feel good when I swoop in and save the day. | |
| **Feeling safe** | If I let go, something bad will happen, and it'll be my fault. | |
| | I'd rather do it myself than risk the client or the work. | |

| | |
|---|---|
| **My loudest payoff:** | |
| **What it's costing me this year in new business that isn't happening:** | |
| **What it's costing me in people I might lose:** | |
| **What it's costing me in time (evenings, weekends, vacations):** | |
| **A rough dollar figure, if I had to put one on it:** | |

**Quick math:** What would one more good client be worth to your AGI this year? What would it cost to replace your best senior person? That's roughly what your payoff is costing you.

# Tool 2: Waiting-On-Me Log

Spot it | Two weeks | Every time something waits on you, write it down. Don't fix anything yet. Just notice.

**Area codes:** A = Approvals and decisions | C = Client relationships | N = New business | Q = Creative and quality control

**Could someone else decide?** Yes / With help / No

## Week one

| Date | What's waiting on me | Who's waiting | How long it sat | Area | Could someone else decide? |
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## Week two

| Date | What's waiting on me | Who's waiting | How long it sat | Area | Could someone else decide? |
|---|---|---|---|---|---|
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## End of week two: read your log

| Area | Number of items | Total time things sat waiting |
|---|---|---|
| A: Approvals and decisions | | |
| C: Client relationships | | |
| N: New business | | |
| Q: Creative and quality control | | |
| **Total** | | |

**The three items costing the most time or blocking the most people:**

| # | Item | Why it matters | "Could someone else decide?" answer |
|---|---|---|---|
| 1 | | | |
| 2 | | | |
| 3 | | | |

**Circle one.** Don't pick the scariest item. Pick the one where getting it off your desk would make the biggest difference. You want an early win for you and for the person you hand it to. Take it to Tool 3.

# Tool 3: Who Could Take This?

Size it | 20 minutes | Tests the “I don’t have the right person” story before you accept it.

| | |
|---|---|
| The item I’m handing off: | |

## Step 1: The honest test

When we say “I don’t have the right person,” we usually mean one of three things. Check the one that’s true.

| | What I really mean | What to do |
|---|---|---|
| ☐ | **I’ve never really handed it over.** I’ve handed off tasks, never the decision. | The fix is on you. Go to Step 2 and pick someone to start at authority Step 1. |
| ☐ | **They won’t do it my way.** They can do it. They’d just do it differently. | This is a control issue, not a people issue. Go to Step 2, and use the “Is it wrong or just not mine?” filter in Tool 5. |
| ☐ | **There really isn’t anyone.** Nobody has the skill, or nobody has the time. | This is a real gap. Do Step 2 anyway, then choose a path in Step 3. |

## Step 2: The closest person

| | |
|---|---|
| The person closest to ready: | |

Rate them 1 to 3 on each question. 1 = not yet, 2 = getting there, 3 = yes.

| Question | Rating (1–3) | Notes |
|---|---|---|
| **Skill:** Can they do the work at a level the client would accept? | | |
| **Judgment:** Do they make sound calls on the decisions they already own? | | |
| **Capacity:** Do they have room, or would something need to come off their plate? | | |
| **Trust:** Do clients and teammates already go to them for help? | | |
| **Desire:** Do they want this? Have they asked for more? | | |
| **Total (5–15)** | | |

| Total | Starting authority step | What it means |
|---|---|---|
| 5–7 | Step 1, with a growth plan | Not ready to decide alone yet. Start them watching and recommending, or choose another path in Step 3. |
| 8–11 | Step 2 | Ready with support. You decide together, they do the talking, and you move them up as they earn it. |
| 12–15 | Step 3 | Ready. They decide, and you review before it goes out. Plan the move to authority Step 4. |

**Low on capacity only?** That's not a readiness problem. It's a workload problem. Decide what comes off their plate before you add this to it.

## Step 3: Choose a path

If there's a person to start with, the path is usually Grow. If there really isn't anyone, pick the path that fits.

| | Path | What it means | Ask yourself |
|---|---|---|---|
| ☐ | **Grow** | Pick the closest person and invest in them on purpose. Building a leader can take 12–18 months. | What training, coaching and small decisions do they need first? Have I told them they're being groomed? |
| ☐ | **Hire** | Go get the person. You're not adding overhead. You're buying back the hours to do the owner's job. | What would those hours be worth in new business? What role, and by when? |
| ☐ | **Borrow** | Use a freelancer, a fractional leader or an outside partner for work that doesn't need a full-time seat. | Is this ongoing, or a project? Who could I bring in within 30 days? |
| ☐ | **Ditch** | Stop doing it. Some of what waits on you shouldn't be done by anybody. | What happens if this just stops? Who would notice? |

| | |
|---|---|
| My path: | |
| First action: | |
| By when: | |
| Starting authority step (from Step 2): | |

# Tool 4: Decision-Rights Map

Size it | 30 minutes | Map the decisions that route through you, then set the authority step for each one you're handing off.

**Authority steps:** Keep = stays with you | 1 = They watch and recommend | 2 = You decide together, they do the talking | 3 = They decide, you review first | 4 = They decide within guardrails, you hear after. Common agency decisions are filled in. Cross out what doesn't apply and add your own.

| Decision | Step today | Who'll own it | Starting step | Guardrails (what still comes to me) | Check-in rhythm | Target step and date |
|---|---|---|---|---|---|---|
| Scope changes on existing projects | | | | | | |
| Creative approval before work goes to the client | | | | | | |
| Discounts or pricing exceptions | | | | | | |
| Hiring a freelancer or contractor | | | | | | |
| Responding to a client escalation | | | | | | |
| Building estimates and proposals | | | | | | |
| Day-to-day contact with our largest client | | | | | | |
| Scheduling and resourcing across projects | | | | | | |
| Approving expenses under $_____ | | | | | | |
| Following up with new business prospects | | | | | | |

| Decision | Step today | Who'll own it | Starting step | Guardrails (what still comes to me) | Check-in rhythm | Target step and date |
|---|---|---|---|---|---|---|
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**Example:** Scope changes stay with you today (Keep). At Step 1, your account lead sits in and tells you what they'd charge and why before you decide. At Step 2, you make the call together, and they do the talking with the client. After a couple of months of good calls, they move to Step 3 and make the call on anything under a set dollar amount, and you take a quick look before it goes out. At Step 4, they handle it within the guardrails and tell you at your weekly one-on-one. The dollar limit can go up as trust goes up.

# Tool 5: Keys Conversation Guide

Say it and stay out of it | 20 minutes to prep | Most handoffs fail because "Can you take care of this?" meant two different things to two people.

## Part A: Prep the conversation

| Cover this | My notes |
|---|---|
| **The decision:** What exactly are you handing over? | |
| **Why them:** What have you seen that made you pick them? | |
| **Starting authority step:** 1, 2, 3 or 4, and what that means day to day | |
| **Guardrails:** Budget, clients, brand, and anything that still comes to you | |
| **What good looks like:** How will you both know it's working? | |
| **Check-ins:** When and how you'll talk about it | |
| **Misses:** What happens when something goes sideways (see Part D) | |

## Part B: What it can sound like

> "I want you to own creative approvals on the regional accounts. I picked you because your judgment on that work is great, and you know these clients better than I do at this point.
>
> For the first 90 days, you make the call and give me a quick rundown in our Friday one-on-one. Anything that changes the strategy or the budget still comes to me. Good looks like the client approving it without me in the room.
>
> You're going to make some calls I wouldn't make. That's okay. I'm not taking this back the first time something goes sideways."

**Tell the team, too.** "Starting today, [name] makes the call on [decision]. Bring those to them, not to me."

**When someone goes around the handoff,** send them back kindly: "That's [name]'s call now. Go talk to them." The first few times will feel strange. It's also when the team starts to believe the handoff is real.

## Part C: Your first 90 days

Say it and stay out of it | 20 minutes to prep | Most handoffs fail because "Can you take care of this?" meant two different things to two people.

| Checkpoint | Date | Ask them | Decide |
|---|---|---|---|
| **Day 30** | | What's working? Where did you hesitate? What do you need from me that you're not getting? | Move up a step<br>Stay at this step<br>Adjust guardrails |
| **Day 60** | | Which calls are you most proud of? Which would you make differently? What's still coming to me that shouldn't? | Move up a step<br>Stay at this step<br>Adjust guardrails |
| **Day 90** | | Are you ready for more authority on this? What would you need to own it fully? | Move up a step<br>Stay at this step<br>Adjust guardrails |

## Part D: When there's a miss

Don't grab the keys back. Your team is watching how you handle the first miss.

| When | What you do |
|---|---|
| **First miss** | Have a coaching conversation. What happened, what did they learn, and what would they do next time? |
| **Second miss** | Figure out what's missing. Is it training, information or authority? Fix that gap. |
| **A pattern** | Adjust the step, for example from Step 3 back to Step 2 for a while, and agree on what earns it back. Don't take it all back. |

## Part E: Is it wrong, or just not mine?

When they do something differently than you would, run it through these questions before you step in.

| Question | Yes | No |
|---|---|---|
| Does it break one of the guardrails we agreed on? | | |
| Will it hurt the client's results or our reputation? | | |
| Would the client notice, and care? | | |

**All three are no?** It's not wrong. It's just not yours. Let it go. Different isn't the same as wrong, and most of the time, the client can't tell the difference.